How **To** Connect and Share with a Web Services Provider

Many utilities and third-party service providers exchange data directly with their customers' Portfolio Manager accounts via web services. Depending on your needs, one or both of these options might be right for you:

- ✓ **Your Utility.** Increasingly, utilities are making this service available to customers for free (mostly in areas where there is a state or local benchmarking ordinance). This is a good option for users with multiple tenants and no access to tenant energy bills, or anyone managing a large portfolio. Most utilities require you to set up this process only once, after which your data will be updated on an ongoing basis. Check to see if your local utility offers web services using EPA's utility data access map and/or directly within the Portfolio Manager interface (see Appendix A).

- ✓ **Energy Service Providers.** Many energy service providers (such as utility bill payment companies, software-as-a-service providers, and energy consultants) include this functionality as part of their fee-based offerings. This is a good option if you don't have the time or staff resources to do energy benchmarking, but are seeking ways to bring your efficiency efforts to the next level. Visit the list of ENERGY STAR service providers that exchange data with Portfolio Manager.

Once you've identified a web service provider and decided to use their service, you will need to set up a connection with the web service provider's account and share access to the relevant Portfolio Manager records. The steps below outline how to do this.

1A   Add Web Services Provider as a Contact

The first step is to add the provider as a contact:

1. Click the **Contacts** link in the upper right-hand corner.

2. On the **My Contacts** page, select **Add Contact**.
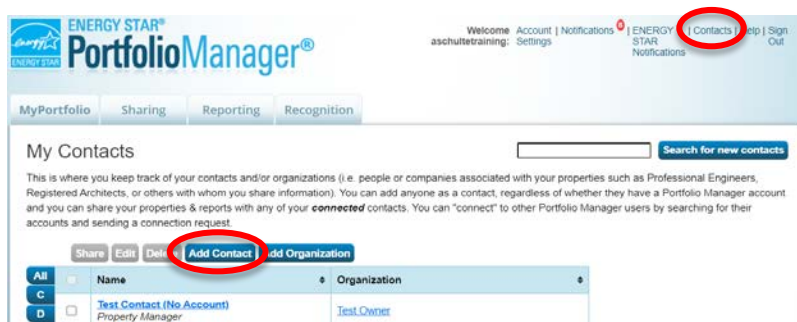
3. On the **Add Contact** page, search for a provider organization by name, username, or email address. Typically, the provider will let the customer know the specific username on which to search.

4. Select the provider organization from the search results (make sure it has the "chain link" symbol that shows it is a web service provider) and click the **Connect** button.

5. After selecting **Connect**, you will be prompted to accept any terms of use specified by the provider. Some providers also require you to enter additional information via custom fields.

6. Select **Send Connection Request.**

7. After sending the Connection request, you will receive confirmation that the request is pending acceptance by the web services provider.

1B   Web Services Provider Accepts the Connection

When the web services provider has accepted your connection request, you'll get a message in the "Notifications" section of your Portfolio Manager account, accessible from the navigation bar at the top of your screen.

User Shares a Property and/or Meters with Web Service Provider

Note: Before you begin the process of sharing your properties with a web service provider, please make sure that you have reviewed any specific guidance that the provider has issued. For example, some providers require that you explicitly share your existing Portfolio Manager meter records with them, while others will only need shared access at the property level.

Now that you are connected to a provider, you can share your properties and/or meters as needed:

1. Click on the **Sharing** tab and select **Set Up Web Services/Data Exchange.**

2. On the **Share Properties for Exchanging Data** screen, select the provider from the dropdown. Then select the specific property(ies) you wish to share.

    Under "Choose Permissions," you can set permission levels in bulk for all properties and meters at once (**Path 1**) or provide different levels of access for each property/meter (**Path 2**).

3. **Path 1: Bulk Sharing.** You can share all properties and meters at the same permission level (e.g., Full Access, Read Only Access). The "Exchange Data Custom Access" option allows you to grant different levels of access by meter type, *as long as those access levels are consistent across all properties for each meter type* (e.g., full access to all electric meters but no access to all gas meters).
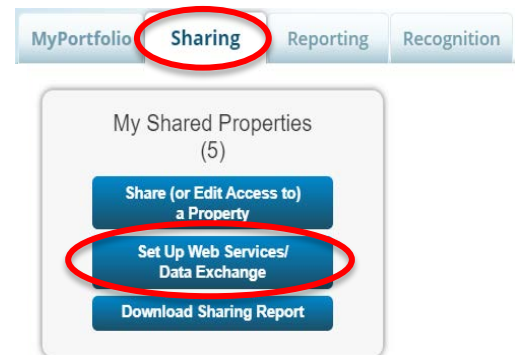
After you select your permission level, click "Authorize Exchange."

Note: If a web services provider requires the entry of custom fields, you will be prompted to download an Excel spreadsheet to populate custom field values for each property/meter you are sharing. This spreadsheet can then be submitted to the Portfolio Manager technical team, which will help to complete the sharing process. The process of creating those shares will take about a week. If you only have a few properties, it's much quicker to use Path 2 (below) and enter this information property by property.

4. **Path 2: Personalized Sharing.** You can set different levels of access for each property here. After selecting this path and clicking "Set Permissions," you will be directed to the **Share Your Property(ies)** page. You'll need to click **Exchange Data** individually for each property to assign access rights.

After you select **Exchange Data** for a property, a dialog box will appear that allows you to select specific level of access for each part of the property record, including each meter. Options are None, Read Only Access, or Full Access.

If required by the web services provider, the user will be prompted to enter additional information for properties and meters on this screen. Examples of such fields could include "utility account ID," "meter number," or any other custom identifier that a provider needs to validate the share request.

Note: some meters may be greyed out. This means that the web services provider does not support that meter type. If this is the case, the user will receive an alert beneath the dialogue box.

After you select your permissions for each property, click "Apply Selections and Authorize Exchange." This will take you back to the prior screen, where you will click "Share Property(ies)."

| | MyPortfolio | Sharing | Reporting | Recognition |

Share Your Property(ies)

To finish up, tell us what type of access the people you have selected should have for each of the properties that you have selected. The option to exchange data is only available for authorized accounts.

4 Select Permissions for Each Contact

The access levels you select do not have to be the same for each property or each person.

Who gets to Share Forward?

Full Access - Automatically includes "Share Forward" rights
Read Only - Automatically does NOT include "Share Forward" rights
Custom - You decide, along with the individual permissions for property, meter, goals and recognition permissions.
Exchange Data -You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Sort by: Property Name ▾

Name (ID)	No Access ○	Read Only Access ○	Full Access ○	Custom Access	Exchange Data
▾ 1234 Office Building (7554054)					
Jane Doe	○				●
▾ ABC Office Building (6663053)					
Jane Doe	○				○

Share Property(ies)   Cancel

Select Access Permissions to 1234 Office Building for Jane Doe.
The following information is required by Jane Doe in order to provide service to your property(ies). If you have any questions about how to complete this information, please contact them directly.

Your Email Address: * [yourname@domain.com]   Example: yourname@domain.com
Please provide your email address in case we need to contact you.; 1 - 100 Characters

Select the permission level below that you would like to grant Jane Doe for each category.

Item	None	Read Only Access	Full Access	Meter Number[1]
Property Information	○	○	○	
▾ All Meter Information				
▾ Energy Meters				
Andrew's Meter	○	○	○	12345
Electric Grid Meter	○	○	○	54321
Electric Grid Meter - Green Power Complete	○	○	○	67890
Natural Gas	○	○	○	2424
🚫 Water Meters				
Goals, Improvements, & Checklists	○	○	○	
Recognition	○		○	

🚫 The provider with whom you are sharing does not support this meter type.
[1] **Your Email Address:** Example: 1234567; Meter number.; Between 1 and 10 Characters
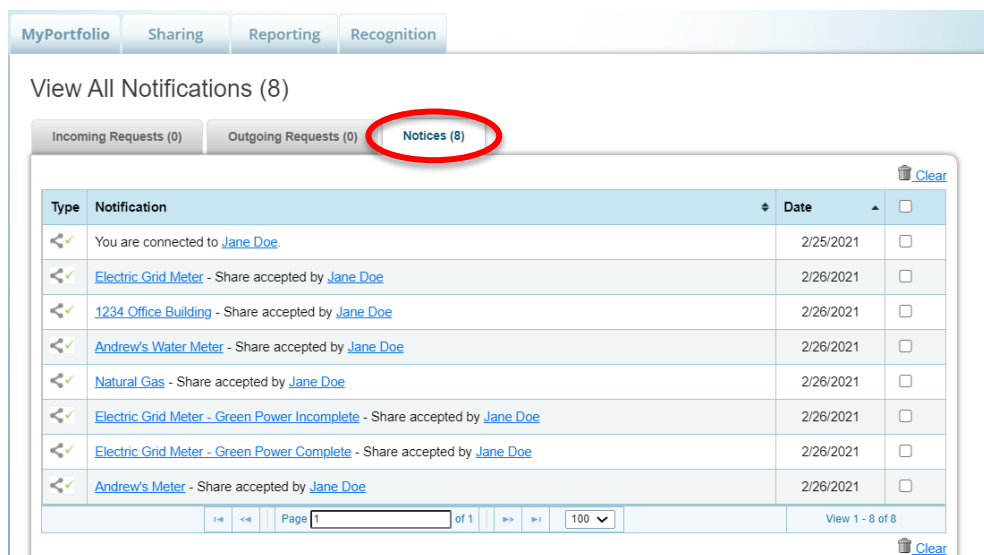
Additional Options:

Item	Yes	No
* **Share Forward** Allow Jane Doe to share this property with others and give them any permissions that he/she has, including the right to share with more people.	○	○

Apply Selections & Authorize Exchange Cancel

2B Web Services Provider Accepts the Property and Meter Shares

When the web services provider has accepted the property(ies), you will be notified via a message in the "Notifications" section of your account. If the provider has any questions regarding your share request, they may reach out to you at this point.

At this point, the Connection/Sharing process is complete and the web services provider has the necessary access within Portfolio Manager. However, please be sure to review your provider's guidance, as additional action may be required outside of Portfolio Manager to start the flow of data. If you do not see updated data in your Portfolio Manager property record(s) within the timeframe specified by your provider, please reach out to the provider directly to identify any outstanding actions that may be needed.

📙 *Learn More!*

To learn more about Portfolio Manager, visit www.energystar.gov/benchmark.
To reference the ENERGY STAR Guide for Licensed Professionals, visit http://www.energystar.gov/buildings/tools-and-resources/energy-star-guide-licensed-professionals.
To get answers to your questions, visit www.energystar.gov/buildingshelp.

📙 *Appendix A: Using the "Find and Connect with My Utility" Feature*

Portfolio Manager has a built-in functionality to help users identify whether the utility serving their property can directly populate meter consumption data via Portfolio Manager web services. If your building's ZIP code aligns with that of a utility offering this service, you will be informed of this in two locations within Portfolio Manager.

1.) From the "ENERGY STAR Notifications" link (accessible from the top of the screen):
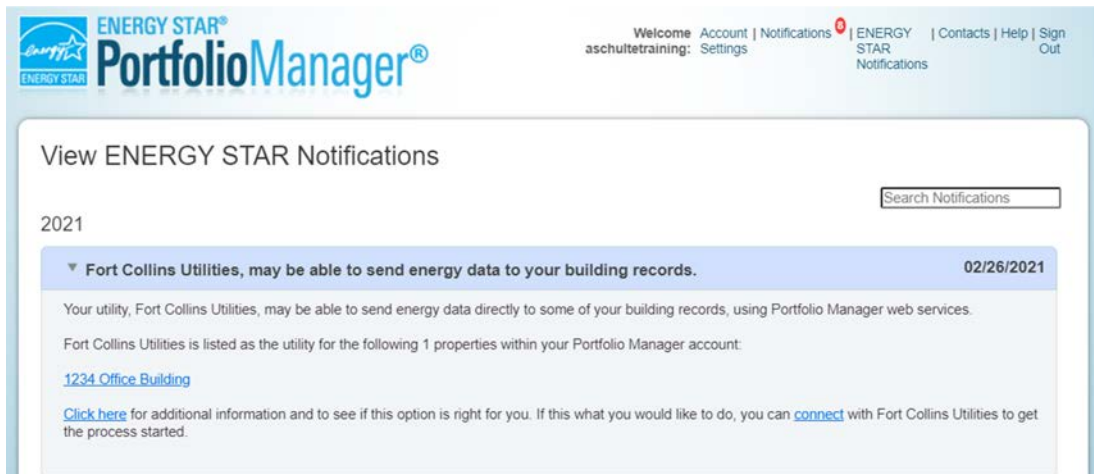
2.) On the "Energy" tab for your individual property:
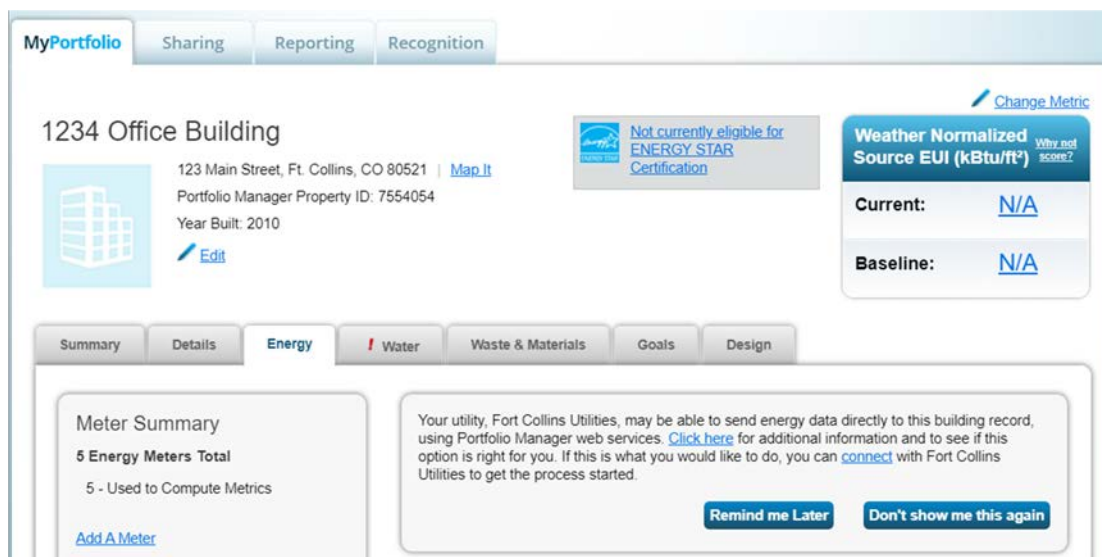
In either case, you will be provided with a link to more information about your utility's offering (which will include the specific steps required to request and begin receiving data). There will also be a link to help you easily Connect with your utility via Portfolio Manager, once you are ready to take that step. If you prefer to connect by searching for a Portfolio Manager contact (according to step 1A in the preceding guide), you can do that as well.